RURAL TOURISM UNDER THE NEW NORMAL: NEW POTENTIALS FROM A JAPANESE PERSPECTIVE

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ABSTRACT
This paper explores the new directions of rural tourism and potential demand characteristics under the new normal resulting from COVID-19 based on an internet questionnaire survey targeted at inhabitants of large cities in Japan. Specifically, this paper reveals the features of potential demand targets, required rural attractions, and essential facilities for micro-tourism, defined herein as tourism around the neighbouring areas of tourists and workcation as the combination of remote work and vacation. Findings were that micro-tourism attracts interest particularly among the mature and workcation attracts interest among younger generations. This is in contrast with the fact that the young have shown lower interest in rural attractions and life than older generations. The natural environment, rural heritage, and local food are three common major attractions for the two types of tourism. Respondents expressed that basic business facilities and restaurants should be available for a workcation. COVID-19 promoted digitalization such as online travel agents and extended the area of e-hospitality based on digital technology in addition to on-site traditional face-to-face hospitality. Thus, operators should understand that hospitality starts at the device terminal and explore how to integrate these two types of hospitality well.
Keywords: COVID-19, rural tourism, micro-tourism, workcation, e-hospitality, resilience.

1 INTRODUCTION

COVID-19 plunged the globe into a huge socio-economic tailspin and particularly inflicted an unprecedented negative impact on the tourism and hospitality industries. The successful inbound promotion policy in Japan was choked off due to border closures. Domestically, there are no clear prospects for the recovery track of tourism and hospitality businesses due to repeated declarations of states of emergency as of January 2022. The tourism and hospitality industries are vulnerable to wars and conflicts, political turmoil, and natural disasters. This pandemic has joined the list of threats.

The emerging variants and waves of surging infections, one after another, has inevitably shed light on the issue of resilience. It is true that new buds of activities are emerging in many arenas. From this perspective, many studies have evaluated the impact of COVID-19 and the recovery track of tourism and hospitality from qualitative and quantitative approaches, examples of which are Fotiadis et al. [1], Sharma et al. [2], Škare et al. [3], and Qiu et al. [4]. With respect to rural tourism, Ohe [5] conducted a short review of the rural tourism situation in Japan, and Polukhina et al. [6] reviewed a Russian case. Ohe [5] considered new possibilities for rural tourism as a result of COVID-19. That, however, was a preliminary report and further investigation of new demands related to tourism in the countryside is needed.

Thus, this paper explores potential emerging demands for rural tourism under the new normal and future evolution of rural tourism based on responses to a questionnaire survey of metropolitan inhabitants after COVID-19. Ohe defines rural tourism from a microeconomic viewpoint, which mentioned that rural tourism is activities that internalize positive externalities generated by multifunctionality of agriculture [7], [8]. Specifically, this paper sheds light on two potential demands for rural tourism. The first is micro-tourism, which is defined as tourism mainly within day-trip distance by the author. The second is the

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“workcation”, which means the simultaneous engagement in the combination of telework and vacationing during a countryside stay by the author. These two types have attracted growing interest, which leads to prospects for the future evolution of rural tourism after COVID-19 [9]. Finally, policy implications will be suggested.

2 IMPACTS OF COVID-19 ON GLOBAL AND JAPANESE TOURISM

2.1 Present situation of rural tourism programs in Japan and the COVID-19 impact

First, on the COVID-19’s impact on inbound tourism to Japan, tourist arrivals had surged from late 2010 to 2019 but subsequently plummeted from 31.88 million arrivals in 2019 to 4.12 million in 2020 and devastatingly to only 0.23 million up to November 2021 due to COVID-19 according to JNTO as of January 2022.

Beginning in 2017, rural tourism in Japan entered a new phase with the inauguration of a novel program called “Nohaku”, i.e., farm/rural stay [8].

What differs among other things from the former type of rural tourism program, i.e., green tourism, is that the novel program is clearly oriented toward viable economic activity although its community-based nature has not changed [10]. Before the advent of the new program, rural tourism heavily depended on school trips for which quality of service did not matter much and which was not targeted at tourists such as the free independent traveller (FIT) and up-market inbound tourists from abroad [11]. For this reason, the former activity resulted in low-average spending per guest and income not sufficient to sustain a young-generation family as a full-time occupation despite how busy they could be with a group of students [10], [11]. Therefore, rural tourism has become directed toward increasing viability as a farm business.

From this perspective, the new program intends to raise the value of the service, to make it a viable business, and to target not only more domestic FITs but also inbound tourists from abroad. In this context, this program is consistent with the national inbound-tourism policy framework. The number of Nohaku areas approved by the Ministry of Agriculture, Forestry and Fisheries (MAFF) was 554 as of the end of 2021 [9].

Nevertheless, COVID-19 inflicted serious damage to the Nohaku business. From 2017 to 2019, domestic arrivals at Nohaku sites increased from 4.748 million to 5.515 million and inbound arrivals increased from 0.286 million to 0.376 million. In total, there were 5.892 million, or close to 6 million, arrivals in 2019. The average number of arrivals per area was about 10 thousand, with domestic tourists accounting for 93% to 94%. This means that the inbound market for rural tourism has not been realized although the new program promoted inbound tourism to rural areas. This high dependency on the domestic market works as a safety net under the situation of border closures because of the pandemic. Now let us look at this aspect specifically. In 2020, after the pandemic began, the number of arrivals dropped to 3.886 million domestic tourists and 0.019 million tourists from abroad. The inbound number markedly plummeted by 95% while there was a one-third drop in the domestic market compared with 2019. Thus, taking the small percentage of inbound tourist in consideration, in the end there was a 30% drop in total stays. Although that 30% reduction cannot be considered light damage, it is also true that the domestic market prevented that business from devastation.

The MAFF report said that the number of meal services largely increased from an average of 18.3 menu items in 2019 to 23.7 menu items in 2020 [11]. This is probably because operators adjusted the food services aiming at day-trippers to compensate for the decrease in demand from other sources. To put it differently, operators expected increased opportunities related to micro-tourism and restaurant activity.

Further, regarding utilities, the utilization of non-contact booking sites, that is online travel agents (OTAs), has significantly grown from 30.7% in 2017 to 63.9% in 2020 (Table 1). Introduction of Wi-Fi slightly increased during the same period.

Table 1: Provision of utilities during "Nohaku". *(Source: Report on Nohaku, October 2021, MAFF.)*

Item	2017			2020			2020/2019
	Yes	No	% Taken-up	Yes	No	% Taken-up	ratio
Using OTA	63	142	30.7	354	200	63.9	2.08
Wi-Fi availability	128	77	62.4	367	187	66.2	1.06
Western style toilet	160	45	78.0	401	153	72.4	0.93
Foreign language	108	97	52.7	281	273	50.7	0.96
Number of approved areas	205		–	554		–	2.70

Note: Years are fiscal years from April to March.

To summarize, under the pandemic, Nohaku operators increased meal service menus and utilization of OTAs, which are necessary for micro-tourism and the workcations mentioned below.

3 IDENTIFYING NEW DEMANDS FOR RURAL TOURISM UNDER THE NEW NORMAL

Under the pandemic, those involved in various aspects of rural tourism recognized that new rural orientations were emerging among urban dwellers [5], [9]. Thus, the author investigates these orientations as potential demand by focusing on micro-tourism and workcations based on the results of a MAFF-supported questionnaire survey to inhabitants of large cities in Japan. First, we shall clarify the definitions of these two types of tourism, which have not yet been described by MAFF. Based on the definition above, micro-tourism is considered as domestic tourism behaviour manifested by visiting places within areas in which daily life is carried out, i.e., daily heritage sites. People are expected to rediscover their own community resources and values. In this context, rural tourism has many suitable elements for this new kind of tourism activities. For instance, although the natural environment and cultural heritage have been traditionally pointed out as rural tourism resources, they are not always well acknowledged and utilized [9]. Micro-tourism can create opportunities for inhabitants to open their eyes toward their own community. Local resources have value in daily life. Inevitably, micro-tourism is naturally comprised of day or short trips.

Second, the workcation is a synthesis of work and vacation, which reflects the rapid increase in telework or remote work due to COVID-19. Telework or remote work represents a style of work rather than a type of tourism. In this context, telework is a component of workcation. Azuma touched upon workcation as a new phenomenon under COVID-19 in Japan [12]. This presents another tailwind for rural tourism. Working in a spacious facility with relaxing surroundings that presents a lower risk of infection can be an attractive feature of a new lifestyle for urban workers used to a daily journey on heavily packed commuting trains. Thus, the workcation presents new values of rural areas in terms of working in a relaxing and safe environment away from infection [5].

MAFF supported surveys to see if there are potential demands for the two types of tourism. The author uses results of one survey conducted to investigate who has the potential demand, what tourists want to do in the countryside, and issues such as necessary facilities and services. Specifically, data were from an internet questionnaire survey conducted by “Hyakusen-Renma”, which operates an online booking site specialized in special interest tourism (SIT) such as temple stays, castle stays, farm/rural stays, etc. This company is an OTA of SIT. This survey targeting a thousand residents in large cities, i.e., Tokyo, Osaka, and Nagoya, from the age of 20 to those in their 70s was conducted in June 2020. Although the return rate was not disclosed, and we should carefully consider this point, the author feels that there is no serious problem in obtaining an overview of the potential of these new types of tourism and related issues from the data provided.

First, Fig. 1 shows that generation-wise willingness to make a trip to the countryside. The figure clearly indicates that the willingness was higher in young than older generations with over 70% of respondents in their 20s and 30s expressing a greater willingness in contrast to the elder generations. This point is interesting as it is quite the opposite of what has been assumed, which is that the young are less eager for the rural experience than their elders [5]. To put it differently, the new normal can generate new opportunities and evolution for the rural tourism business.

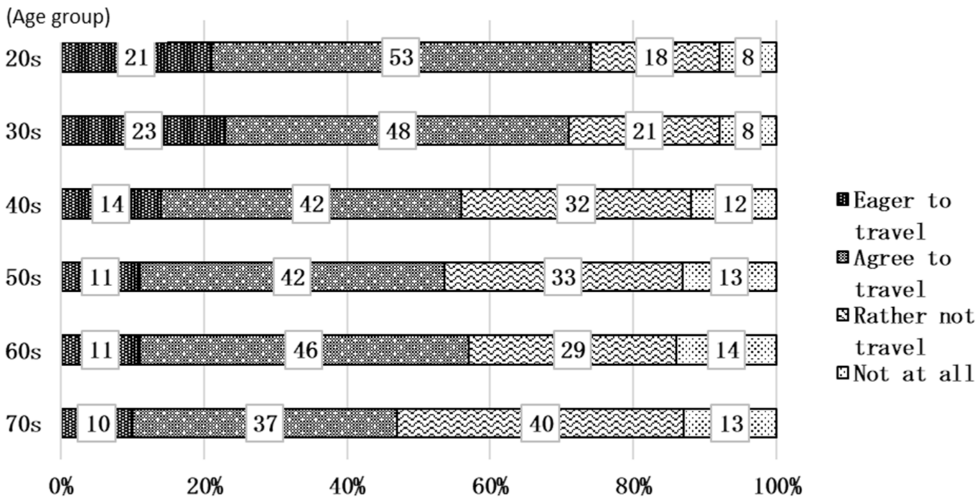

Figure 1: Generation-wise willingness to travel to rural areas. *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

As to the purpose of the rural trip under the new normal (Fig. 2 (multiple choice)), “Rediscovery of neighbouring destinations” accounted for the highest response (62.4%) followed by “as telework site” (30.2%). These two responses demonstrate the potential demands for micro-tourism and workcation, respectively. Of interest is that these orientations are expressed under the new normal. Conversely, we can say that COVID-19 unveiled a potential demand for rural tourism that has not been observed before [8, pp. 38–39]. Thus, we need to further look at generation-wise differences in the selected purposes of the tourism.

The proportion of respondents selecting a workcation was higher in younger generations than in the elder generations: 46% in their 20s, 35% in their 30s, and 25% in their 40s (Table 2). This result demonstrates that a workcation can be accepted among the younger generations. In contrast, micro-tourism does not show distinctive generational differences. Two-thirds of those in their 50s preferred micro-tourism, which means that mature individuals have a great interest in this type of rural tourism. Rural experiences for children, which have been promoted by policy, had only a 10% level of interest except for 28% of respondents in their 30s who would be supposed to have small children.

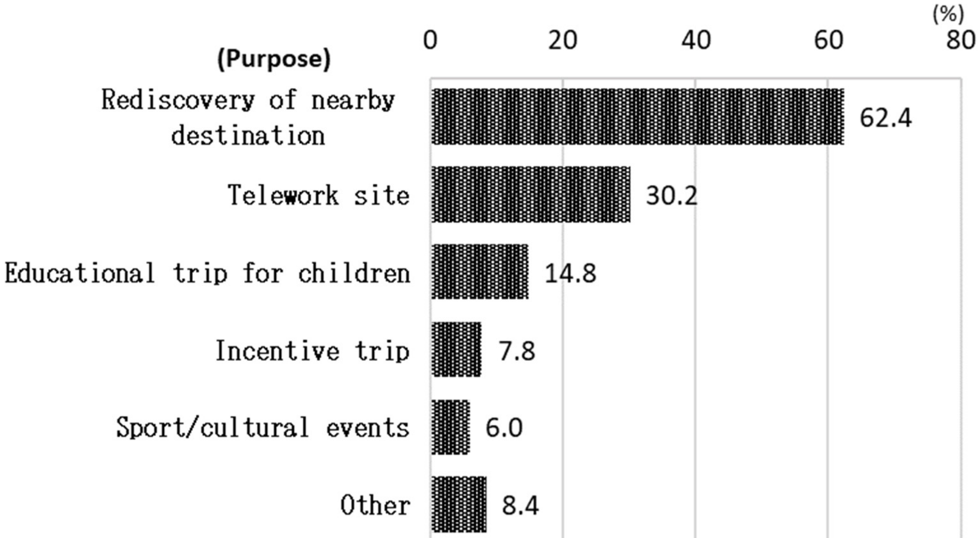

Figure 2: Purpose of trip to rural areas under the new normal (multiple choice). *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

Table 2: Generation-wise purpose of rural visit (multiple choice). *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

Age group	Telework site	Workcation site	Micro-tourism	Incentive trip	Educational trip for children	Sport/cultural events	Other
20s	15	46	59	11	16	7	5
30s	17	35	61	13	28	5	3
40s	13	25	51	7	16	5	10
50s	13	18	67	5	8	5	8
60s	5	11	66	7	9	6	13
70s	8	7	70	4	11	8	12
Total	12	24	62	8	15	6	8

To summarize, we can understand that these new types of rural tourism attract different generations: workcation for the young and micro-tourism for the older generations. Further, micro-tourism attracts more than half of those in their 20s and a wide range of generations. Thus, micro-tourism will be widely accepted.

To specify potential demand further, now turning to workcation by occupation. There is a large difference from one occupation to another (Table 3). Among the over the 30% selecting workcation were students (50%), self-employed (35%), full-time company employees (34%), and company executive/presidents (32%). Conversely, interest was much lower by pensioners (2%) and full-time housewives/husbands (11%) due to the lower necessity to telework.

Table 3: Occupation-wise purpose of rural visit under the new normal. *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

Item	Telework site	Workcation site	Micro-tourism	Incentive trip	Educational trip for children	Sport/cultural events	Other
Company employee (full-time)	15	34	58	16	10	5	4
Company employee (not f-time)	8	21	58	10	8	4	9
Self-employed	13	35	59	12	8	6	13
Company owner/manager	9	32	50	5	27	23	9
Part-time worker	8	16	72	21	10	8	9
Full-time housewife/husband	9	11	68	23	4	4	16
Public employee	7	16	65	19	9	2	5
Pensioner	2	2	80	10	1	3	8
Student	20	50	60	0	0	10	10
No occupation	13	11	58	9	2	9	16
Other	18	18	64	18	9	18	9
Total	12	24	62	15	8	6	8

Thus, it is safe to say that these new types of tourism attract various segments while students are common in selecting both types of tourism probably because they are time-flexible and more sensitive to work–life balance.

To further explore the preference for workcations, Fig. 3 shows interest toward telework and workcation by the type of jobs. There is great interest in teleworking across job types (Fig. 3). However, the degree of interest is different from one type of job to another. Thus, telework and workcation go well together for some types of work but not for other types. This indicates that there is a difference in demand between telework and workcation, which suggests that the two do not represent an identical market. Specifically, among creators/editors and IT workers/engineers over 30% responded for workcation and over 20% for telework, percentages that are roughly in parallel.

In contrast, nearly half of civil engineering/construction/farm/forest/fishery workers expressed interest in workcation but only 29% for telework. Of teachers/lecturers 42% selected workcation and 17% selected telework, while 38% and 10% of service/sales workers and 36% and 9% medical/nursery/welfare workers selected workcation and telework, respectively (Fig. 3). These results suggest that those with jobs that are difficult to take telework with them and that are stressful expressed a higher interest in workcation.

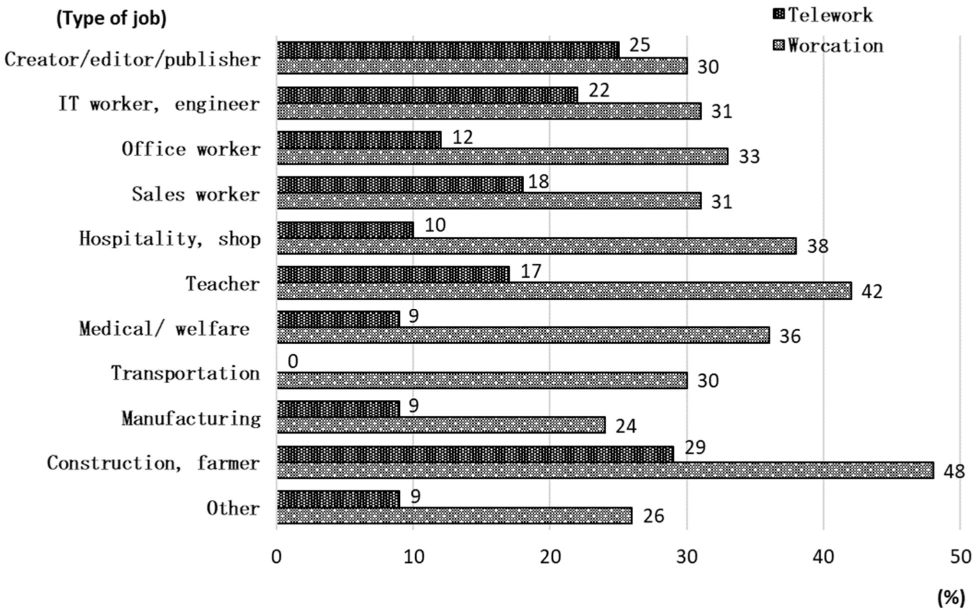

Figure 3: Purpose of rural visit under the new normal (type of job). *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

To summarize, we can say that workcation provides an opportunity to relieve stress mainly for those in the service industry, which is of social significance in that rural tourism can provide workspace and holiday space together.

Finally, we look at necessary attractions and facilities for a workcation. Fig. 4 illustrates what additional values respondents expected for a workcation (multiple choice). Most popular were rich nature and landscape views and local wining and dining (both 86%), followed by a traditional town, ability to walk to historical sites, and cycling (67%). Thus, it is safe to say that nature, heritage, and food are the three major attractions for metropolitan inhabitants.

Fig. 5 shows the required facilities for a workcation (multiple choice). Basic office facilities such as high-speed Wi-Fi, teleconference gadgets, and photocopy machines must be provided. Following were neighbouring supermarket/convenience stores (67%) and neighbouring restaurants/delivery services (65%). In short, respondents want basic office equipment and nearby businesses that can provide daily necessities. Further, additional utilities were selected such as onsen (53%), i.e., hot springs, dining kitchen (47%), and private space for a family (47%). These utilities will make the stay comfortable and memorable, which may lead to repeat visits in the future.

To conclude this section, it was revealed that necessary conditions for a workcation are basic office equipment and private space for the family in terms of hardware, shops available for necessities as social infrastructure, and nature, heritage, and local food as rural attractions.

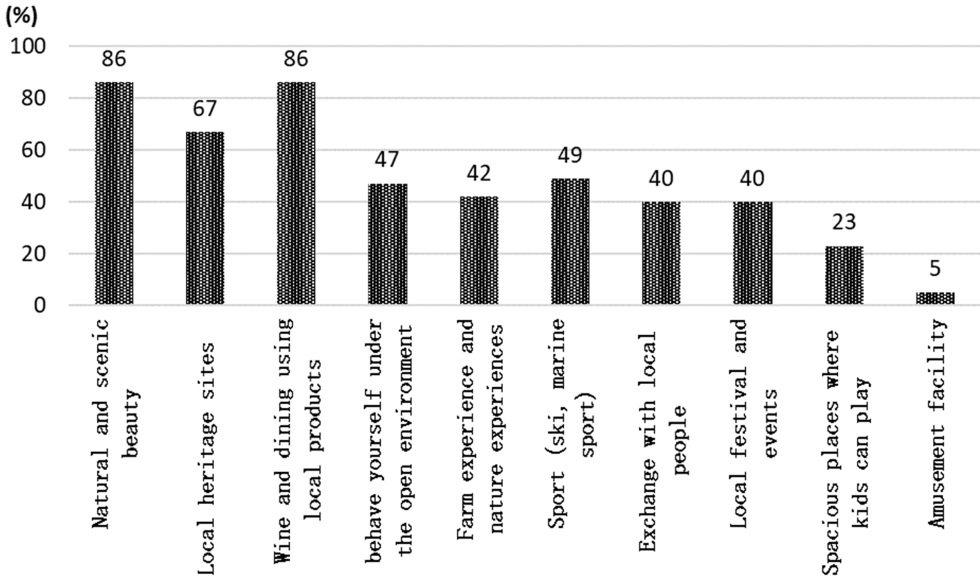

Figure 4: Necessary additional values for workcation/telework (multiple choice). *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

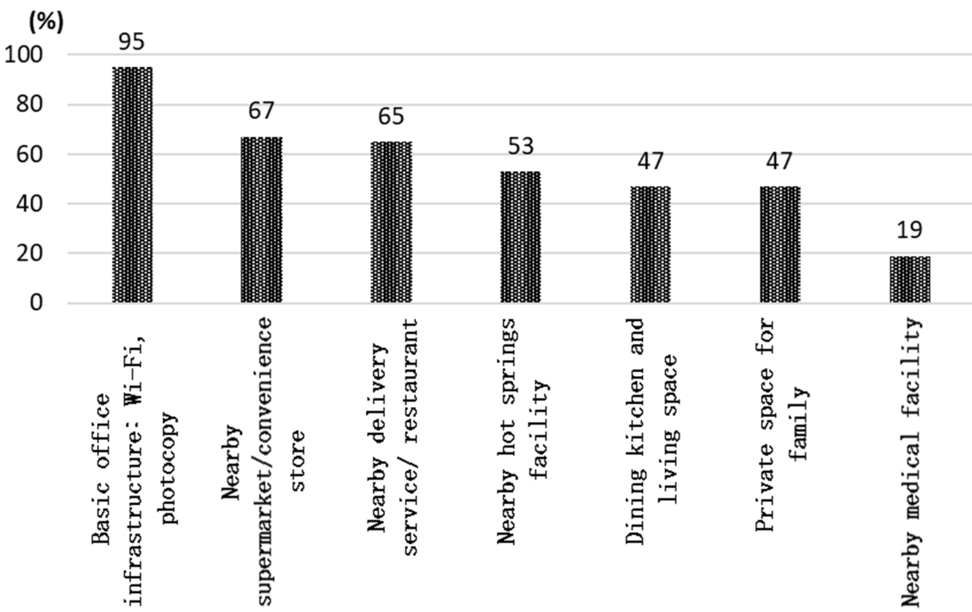

Figure 5: Necessary facility/equipment for workcation/telework (multiple choice). *(Source: Internet questionnaire survey to three Metropolitan inhabitants conducted by Hyakusen-Renma in June 2020.)*

4 EXPANDING DOMAIN OF HOSPITALITY: E-HOSPITALITY

To put these potential demands into practice as a rural-tourism business, the author considers what was not included in the survey results, which were hospitality issues. An OTA that is specialized in SIT, such as Stay Japan, has been emerging in Japan. As OTAs have diffused, the service domain that they provide has expanded from a basic accommodation-booking function to the provision of information on nearby attractions, transportation booking, etc.

Thus, let me consider what influence the development of OTAs exerts on what hospitality should be, which is termed as one of "the e-hospitality effects". OTA services are convenient for tourists and increases the number of users due to network externality. This expansion further stimulates increases in the types and content of OTA services. It should be noted that the e-hospitality effects are not limited to the improvement of tourists' convenience. Although hospitality issues have not been studied in the rural tourism arena, it is important for managers to appropriately understand the effects of e-hospitality [5], [13].

In the field of hospitality management and marketing, Wood touched upon the Ritzer's well-known concept of McDonaldization [14] in hospitality industry as service industry. This concept represents the principles of production rationalization applied to service industry originated from manufacturing industry [15]. This is one direction of hospitality. The digital transformation (DX) is also considered as the same line of evolution [15].

Bojanic and Reid pointed out the effect of improved customer communication and relations in electronic commerce from marketing perspectives [16, pp. 229–244]. Bojanic and Reid also deal with social media from advertising point of view [16, pp. 274–294].

Busulwa et al. addresses the digital disruptions such as disruptions in available data and disruptions in competitive landscape caused by digital transformation [17]. Thus, how to cope with these digital disruptions are crucial issues to the digital transformation for rural tourism operators as well [17].

In keeping that hospitality issue in mind, the author considers the significance of e-hospitality in connection with traditional face-to-face hospitality (Fig. 6). E-hospitality means that hospitality services are provided in a non-contact way, i.e., the internet. The components of services are booking, transportation, trip-planning support, selling local products, exchange with local people, training programs, etc. [5]. Fig. 6 contrasts the two phases before (on the left) and after COVID-19 (on the right). The difference between the two phases is that the domain of e-hospitality enlarged after COVID-19. Traditional face-to-face hospitality is risky for tourists in the sense that the quality of service is uncertain until experienced, which is a feature of experience goods.

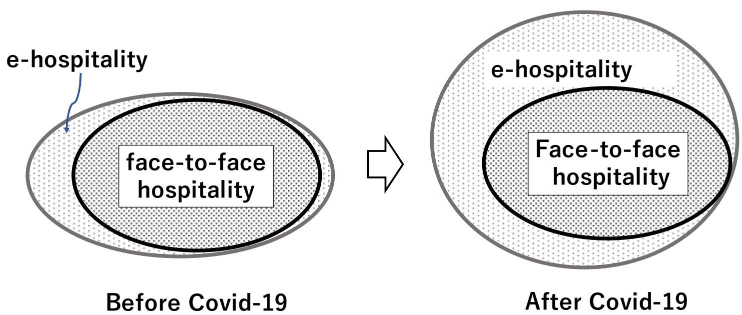

Figure 6: Conceptual model of hospitality business before/after COVID-19. *(Source: Modified based on [13])*

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When e-hospitality service improves, to some extent tourists can grasp the quality of hospitality at the destination before arrival and uncertainty for tourists is reduced. The risk-easing benefits are not limited to tourists but also to rural tourism managers. Because managers can convey service contents beforehand, which can reduce the risk of receiving complaints from tourists who are disappointed due to unreasonably high expectations. This is the second e-hospitality effect generated for both tourists and managers of rural tourism.

This means that part of the hospitality is already implemented on the internet screen rather than on-site at the gate of accommodations. Thus, managers should recognize that hospitality starts on the website, which is what is different from face-to-face hospitality. Since the domain of e-hospitality will continue to expand further, it will become crucial for managers to properly understand this point.

From the above consideration, we can say that face-to-face hospitality and e-hospitality are substitutable. COVID-19 rapidly promotes substitution of face-to-face hospitality with e-hospitality. Although the substitutable area is not small, there is no doubt that essential elements belong to face-to-face hospitality. In this respect, complete substitution is not possible because face-to-face hospitality is indispensable to determine the final satisfaction of tourists. To put it another way, this substitution enables managers to save time and energy and put this saved time and energy into enhancement of the core hospitality provided face-to-face. This is the third e-hospitality effect.

Thus, it is important for effective marketing and management of rural tourism to integrate e-hospitality and real face-to-face hospitality since e-hospitality will continue to expand its domain through the substitution and development of its own new area.

To summarize, the new normal creates opportunities for the rapid progress of e-hospitality and increase its importance, such as improvement of convenience, risk reduction and saving time and energy for face-to-face hospitality. Thus, it will be increasingly necessary to integrate e- and face-to-face hospitality, which is termed here as integrated hospitality. Since the issue of integrated hospitality has been little investigated, this will be a new research topic under the new normal. Consequently, it will become necessary to consider policy design of support measures on how to properly manage integrated hospitality for rural tourism in the future.

5 CONCLUSION

Rural tourism in Japan has been far behind the national trend of inbound tourism from abroad. Although COVID-19 exerted a serious reduction in the number of stays in rural tourism, i.e., loss of one-third of the market compared with pre-COVID-19 in 2019, marginal dependence on the inbound market avoided devastating consequences. During the slow business period of COVID-19, increases in the number of meal menus and progress in using OTAs were observed, the continuation of which will be effective for the evolution of rural tourism after COVID-19.

On the positive side of COVID-19, although COVID-19 shrunk the B-to-B demand for farm and fishery products, it also generates opportunities to let rural tourism managers rediscover rich local resources and reconfirm the local identity, which could lead to new rural tourism businesses. Thus, this paper revealed that new demands such as for micro-tourism and workcation are emerging based on the internet questionnaire survey to metropolitan inhabitants in Japan. The time-flexible mature generation prefers micro-tourism while workcation is preferred by younger generations who seek a flexible work style. This shows that the two new demands are segmented markets. The significance of workcation is a new lifestyle away from the congested risky urban lifestyle under the new normal, which is a novel perspective never observed in the former rural-tourism programs. Thus, workcation can open the door to rural tourism for the young generation that has had little interest in rural tourism before.

From a hospitality perspective, the domain of face-to-face hospitality has partially moved to non-contact e-hospitality. This partial transition means not only simply changing from face-to-face to online, but also represents changes as to where and when hospitality is begun to be offered, i.e., from starting on site to starting on the website. The rural tourism manager should adequately understand this shift caused by surging e-hospitality. The shift from face-to-face to e-hospitality will deepen due to rapid IT progress.

Nevertheless, this trend does not mean that the role of face-to-face hospitality will shrink but that a chance to enhance the original value of face-to-face hospitality will be offered. In this context, it is essential to explore how to maximize the value of face-to-face hospitality in taking advantage of e-hospitality. Consequently, we should focus more on how to offer integrated hospitality to tourists and design support measures for that purpose. COVID-19 also makes us realize that we need to launch full-scale hospitality research in rural tourism.

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